

ADMINISTRATIVE - INTERNAL USE ONLY

## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Role of Intra-Agency Groups in Establishing New Retirement System

FROM:

ADD/Pers/EBS

EXTENSION

NO.

DATE

OP-1780

26 June 1986

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. DD/Pers/EBS

26 JUN 1986

2.

3. EO/Pers

JUN 27 1986

4.

5. ~~AD/Pers/EBS~~

JUN 27 1986

6.

7. D/Pers  
6N20

8.

9.

10.

11. ADD/Pers/EBS

7 JUL 1986

12.

13.

14.

15.

3 to 5: This is something  
D/P asked DO/EBS  
to prepare for him/ae

EXU: This is fine. Would you ~~copy for~~ ~~copy for~~ ~~copy for~~  
please detach copy of triable and }  
Keep handy for monitoring purposes } done  
7 July/ae

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OP-82-1780

26 JUN 1986

MEMORANDUM FOR: Director of Personnel

FROM

[REDACTED]  
Associate Deputy Director of Personnel for  
Employee Benefits and Services

SUBJECT: Role of Intra-Agency Groups in Establishing  
New Retirement System

1. The establishment of the new Federal Employees' Retirement System provides the Agency with the authority to administer retirement programs for all of its employees. The law requires that key elements of the new system take effect on 1 January 1987, so actions needed to implement the system must be identified and quickly taken. The compressed time for implementation will require close coordination between several Agency components, as well as with some other Government agencies. To affect this coordination and to ensure that all important issues are addressed, two groups have been established--the Policy Group and the Working Group.

2. The Policy Group is charged with identifying and dealing with the key policy issues cutting across component boundaries that will affect implementation of the new retirement legislation. The Group will ensure that the appropriate actions are taken within components to set up procedures to operate the system. For example, it may have to determine if the Agency needs to adopt a new way to process retirees or how automated systems in implementing offices should interface. The Policy Group will also address budgetary and legal considerations that will arise as tasks and responsibilities are identified as well as bring important issues to the attention of Senior management. The Policy Group is chaired by the Associate Deputy Director of Personnel for Employee Benefits and Services (ADD/Pers/EBS) and is composed of senior officers from the Offices of Personnel, Finance, Information Technology, Comptroller, and General Counsel. Representatives from other offices, [REDACTED] will attend its meetings as appropriate. The Group will meet every two to three weeks to review issues and to monitor the progress of the Working Group. The Chairman will regularly report to the Director of Personnel and Deputy Director of Personnel for Employee Benefits and Services on Group activities.

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4. The Working Group will be the action arm of the Policy Group, performing the staff work necessary for the Policy Group to make decisions. The Policy Group will oversee the work of the Working Group, prioritize its efforts, and provide guidance when important decision points are reached. The Working Group, composed of mid-level officers from the same offices represented on the Policy Group, will identify what needs to be done in each office, develop priorities for these tasks, and ensure that the tasks are carried out in a timely fashion. Some of the things that the Working Group will address will be how the Agency will process retirement claims for people not in CIARDS-type programs, what new or modified automated systems are needed to support FERS, what additional records must be maintained, and how the Thrift Savings Plan will be administered by the Agency. Working Group members will interface with task forces that have been established within implementing offices to ensure that all component concerns are aired, policy and procedures developed, and follow-up action is taken by the component. Operating under the direction of ADD/Pers/EBS, the Working Group will be chaired by Lynn Bast, Employee Benefits and Services, Office of Personnel, who will also attend meetings of the Policy Group. The Working Group probably will meet at least weekly until the Agency has mechanisms in place to administer the new retirement system.

5. Attached are a list of critical tasks that must be performed during the next year. The list is not intended to be definitive nor can it be at this stage. It will be refined and updated after the Groups have had an opportunity to review what needs to be done in more depth. The action dates shown with each task are tentative and may be modified as we become more aware of implementation requirements.

STAT

Attachment:

A/S

cc: C/RD/EBS/OP

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